PeopleSoft’s May 2014 deployment introduced challenges to the university’s ability to efficiently and effectively process travel vouchers. This is significant, as nearly 1,300 faculty and staff create and approve travel documents, and more than 2,100 individuals travel.

The Travel Workflow Implementation Team formed as a “grass roots” tiger team in the spring of 2016, comprising cross-functional subject knowledge experts. They worked collaboratively for nearly nine months, committing 3,000 hours to streamlining the travel workflow process to meet the needs of our customers and the university as a whole.

All of this project work was performed on top of team members’ regular job duties. As financial “agents” of university funds, the team worked tirelessly at brainstorming, validating, and testing.

Communication was the key ingredient in fostering open and positive dialogue, soliciting customer feedback and resolving problems that hampered the travel workflow process. Every aspect of the group’s work to eliminate redundancy and accelerate processes was built around “teamwork.”

Here are a few of their successful processes:

- Sought “buy-in” by partnering with campus users early in the project. Sent surveys to understand customers’ challenges with the travel process, recording 700 responses.
- Identified the “root causes” of systemic limitations and addressed each one head on. Advanced efforts toward electronic approval routing and paperless processing.
- Created and tested 160 specific scenarios, testing repeatedly at each system change.
- Took a “proactive” approach that significantly improved customer service across the campus community.
- Involved the right players in focus groups and in testing. Nearly 100 users tested the online training.
- Brainstormed at each phase ways to eliminate duplication (entering in SharePoint and in the PeopleSoft System), streamline processes (eliminated paper forms, excluding exceptions) decreased reimbursement processing time) and provide users more training options (online, in person, written guidelines and FAQs).
- Created more than 13 system modifications to the UT Share PeopleSoft System to enhance efficiency.
The Results:

- The travel system is streamlined. Travel reimbursements (expense reports) are now processed faster.
- Prior to this project, 72% of the travel reimbursements were processed and approved in 10 business days. Since travel workflow was implemented, that number climbed to 91%.
- Now UTSA has a paperless system—no more hard copies required! Documentation can be scanned, attached, and tracked.
- Travelers and administrative staff can now pinpoint “exactly” where their travel authorizations, expense report and cash advance approvals are in the workflow pipeline.
- Supervisors can easily approve the authorization of travel.
- UTSA became “frontrunners of change” for implementing electronic approval routing and paperless processing. Other institutions that use PeopleSoft have adopted processes developed by this team.

UTSA travelers want to focus on the purpose of their trip, not the administrative processes behind it. The positive “can-do” attitudes of the Travel Workflow Implementation Team made that happen. Their continuous communication, collaboration, cooperation and commitment to this project has resulted in significantly greater productivity, efficiency and effectiveness campus-wide. They surmounted the challenges and demonstrated exceptional abilities as proven leaders who listened to customers and delivered a new travel process that is now faster, complete, transparent, and paperless.

Kathy Funk-Baxter handed each member of the team a personalized padfolio with a Rowdy dollars gift card.

Congratulations and thanks to the Travel Workflow Implementation Team for living the Business Affairs Guiding Principles.